

Sample Bequest Language

Following are examples of how to indicate a general or undesignated gift to the Sierra College Foundation:*

Sample Gift of Specific Asset

A specific bequest gives a specific item or specific piece of property to the Sierra College Foundation. Such bequests are fulfilled first, before cash and residuary bequests. If the donor disposes of the specified property during his or her lifetime, there will be no bequest to The Sierra College Foundation.

"I give _____ (describe asset) to Sierra College Foundation, TAX I.D. #23-7241877, to further the objectives and purposes of the Sierra College Foundation. The Sierra College Foundation may be contacted in care of its Executive Director, 5100 Sierra College Blvd, Rocklin, CA 95677, (916) 660-7021"

Sample Gift of Specific Amount

A cash bequest provides the Sierra College Foundation with a specified sum of money from a donor's estate. These bequests are fulfilled second, after specific and before residuary bequests.

"I give, \$_____ to the Sierra College Foundation, TAX I.D. #23-7241877 to further the objectives and purposes of the Sierra College Foundation. The Sierra College Foundation may be contacted in care of its Executive Director, 5100 Sierra College Blvd, Rocklin, CA 95677, (916) 660-7021"

Sample Gift of Remainder of Estate

A residuary bequest is made from the residue, or what remains in a donor's estate after specific and cash bequests, taxes, settlement costs and debts are satisfied. This type of bequest is sensitive to changes in the size of the estate over time.

"I give, to the Sierra College Foundation, TAX I.D. #23-7241877, all [or state the fraction or percentage] of the rest, residue, and remainder of my estate, both real and personal, to further the objectives and purposes of the Sierra College Foundation. The Sierra College Foundation may be contacted in care of its Executive Director, 5100 Sierra College Blvd, Rocklin, CA 95677, (916) 660-7021"

*These are suggestions as to content and should be written or adapted by your attorney to ensure it meets your estate planning goals.